



HEXAWARE

Streamlined Shareholder Data Management for a Global Professional Services Firm

Reducing manual work and improving
accuracy with a cloud-based solution

Case study

Client

- | Client
- Challenge
- Solution
- Benefits
- Summary

Our client is a leading professional services company headquartered in Hong Kong, with operations in over 40 countries and more than 4,000 employees. The company specializes in providing tailored trust, fiduciary fund, and corporate services.



Challenge

Client

| **Challenge**

Solution

Benefits

Summary

The client needed to manage records of shares held by their employees, but their existing system relied heavily on Microsoft Excel, which introduced several issues:

- Managing shareholder data manually in Excel required significant effort.
- The process was highly dependent on individual users, leading to potential delays and inefficiencies.
- Manual data entry increased the risk of errors, and the Excel-based system was not user-friendly.

The client also needed enhanced reporting functionality, dashboards, notifications for system users, and a streamlined workflow to manage subscriptions, approvals, and leave records.



Solution

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We developed an independent, secure, and scalable cloud-hosted application using the Microsoft Azure platform. The solution featured:

- **Central Data Repository:** A cloud-based system that centralizes all shareholder equity data, providing easy access and management.
- **Enhanced Security:** Two-factor authentication and database encryption were implemented to protect sensitive data.
- **Streamlined Workflow:** The application has two different streams, one that provides transaction data like purchase, sell, and share loans, dividends, and exits, and the other that shows details like dashboards, approvals, management, and regulatory reports.
- **Dashboards and Reports:** Interactive and graphical reports and dashboards were built to improve user experience and real-time insights.
- **Automation and Notifications:** The system includes notifications for important updates and automated workflows for approval management.



Benefits

Client

Challenge

Solution

| **Benefits**

Summary

The new cloud-based shareholder equity management system delivered substantial improvements in efficiency and accuracy. Key outcomes include:

- **Reduced manual efforts:** The solution significantly minimized the time and effort previously spent on managing Excel-based records.
- **Lowered error rates:** Automation and a centralized database reduced errors caused by manual entry.
- **User-friendly experience:** An intuitive interface with interactive dashboards and reports enhanced user experience.
- **Improved process efficiency:** Approval workflows improved transaction quality and management reviews.
- **Enhanced security:** Implementation of robust security measures protected sensitive shareholder information.



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Hexaware transformed a leading professional services firm's shareholder equity management process by developing a cloud-hosted application on the Microsoft Azure platform. This central data repository improved user experience, streamlined workflows, and reduced manual errors. With enhanced reporting and dashboards, and robust security measures, the new system enabled optimized shareholder data management, allowing for more efficient operations and secure handling of sensitive information.



About Hexaware

Hexaware is a global technology and business process services company. Every day, Hexawarians wake up with a singular purpose: to create smiles through great people and technology. With this purpose gaining momentum, we are well on our way to realizing our vision of being the most loved digital transformation partner in the world. We also seek to protect the planet and build a better tomorrow for our customers, employees, partners, investors, and the communities in which we operate.

With offices across the world, we empower enterprises to realize digital transformation at scale and speed by partnering with them to build, transform, run, and optimize their technology and business processes.

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